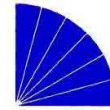




Confederation of the European
Bicycle Industry
Colibi-Coliped
Since 1960 Representing the European Bicycle Industry



EUROPEAN
BICYCLE
MANUFACTURERS
ASSOCIATION

EU BICYCLE INDUSTRY'S GREEN EMPLOYMENT AND INVESTMENTS / INNOVATION STUDY

in 2021

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OPEN VERSION

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Dear Madam/Sir,

Please kindly find enclosed the latest results of our research for our EU Bicycles, Ebikes and Components Industry in Europe.

After the first study of December 2012, the second one in December 2016, and the third one in March 2019, this December 2021 update is very important, as it is underlining the current expansion of our EU Bicycles, Ebikes & Components Industry both in Green jobs, investments/innovations and number of sustainable Manufacturing SMEs, thanks to the Antidumping-Antisubsidy measures adopted by the EU COM against unfair competition and subsidized dumping, and to our innovations, which make our Industry the most innovative in the world.

Our Industry is a very good example of an EU sustainable economy developed locally by SMEs: realistically, the only possible way to seriously cut Co2 & sulphuric dioxides emissions, and create good long-term industrial Green jobs locally for our younger generations, is to help and defend the development of EU Manufacturing SMEs. We are one of the largest E mployers of the EU Green Industries.

The expansion is mainly due to the further development of our most important innovation of the last 20 years: the Pedal-Assist Ebike, which would not have been invented if our Industry didn't survive the unfair competition from PRC's exporters. We have now over more than 155.000 Workers Direct-Indirect, and more than 1000 SMEs capillary distributed in 24 of the 27 EU Member States+UK, generating approximately 1.8 Billion EU investments/innovations and approximately 20 Billions EU worth of Industrial output. Our Workers and SMEs are extremely thankful to the EU COM's adoption of antidumping-antisubsidy for PRC's originated Pedal Assist Ebikes, and also hope in the EU COM's adoption of the renewal of antidumping for the regular bicycles early September 2023 against subsidized dumping from PRC.

We kindly ask you to take the following points into consideration:

- 1) CONEBI is considering in our yearly Industry Data the data provided by our National Associations and Industry Experts. Indeed, not all Producers of Bicycles, Pedal-Assist Ebikes and Components are member of a National Association (probably not over 60%) and this explains why these figures are higher and different from the annually provided data by Colibi-Coliped in the years before 2013.
- 2) Bicycles, Pedal-Assist Ebikes and Components are produced in Europe by the vast quantity of over 1000 SMEs with a direct workforce of approximately 80.000 European employees.
- 3) A very important number of upstream ancillary companies furthermore provide:
 - **raw materials** (aluminum, steel, stainless steel, plastics, carbon fibers, titanium, magnesium, paint)
 - **machinery, tools, technical equipment**
 - **maintenance of the technical equipment**
 - **maintenance and enhancing of industrial buildings**
 - **canteen and catering for the Workers**
 - **transports**
 - **packaging materials**
 - **other services**

We calculated that this means that at least another approximately 75.000 Green jobs upstream are involved, in many industrial districts of the 27 MS+UK. Many ancillary companies are at serious risk to disappear if the Bicycles, Pedal-Assist Ebikes and Components Producers are forced to shut down by the dumping and ever growing overcapacity of subsidized Chinese Exporters. This calculation of one direct job equals one indirect one

is a very conservative estimation as can be seen by the [attached studies](#) about the correlation between direct and indirect Green jobs in the manufacturing industry.

4) We must emphasize that we have to take into consideration all the EU Producers of those accessories (cycling apparels, helmets, and other aftersales accessories) which are not assembled directly to the bicycles. Nevertheless, we must point out that - in case of bicycles would be imported from China - for sure also all the accessories will be produced over there, to be shipped together with the bicycles.

In total, we have another 10.000 workers who are directly employed by such accessories Producers, with again as many indirect workers who supply the raw materials, machineries and so on. In the USA and Japan - where they completely lost their Bicycle Industry as no AD measures were renewed - not one company is left producing any accessories for bike riders, everything is imported from China, like the Bicycles & Pedal Assist Ebikes. If Europe shall lose its industry, an almost worldwide monopoly of China will be the result, with the exceptions of Mexico, Brasil, Argentina, Turkey, India and Bangladesh (these countries all have antidumping or high duty regulations to allow their industries to have a legitimate defense against subsidized dumped products from Chinese exporters).

5) We must underline as well that - in case the EU Bicycle Producers would be put out of business by the subsidized PRC's dumping - the whole production of high-tech EPACs (Electrically Pedal Assisted Cycles) disappear in Europe, to be absorbed by the Chinese exporters. It would not be economically viable to produce only E-bikes in Europe, without the Bicycle production. This would be a very dangerous loss of a very promising, high-tech, very innovative and totally green EU Industry: really strategic in the EU for the Co2 emissions cuts. The EPACs were invented and developed in Europe by the EU Bicycle and Components Industries. We are now developping with the EU COM as well as the Motorcycle and Car Industries the ITS connectivity among vehicles, which will save many thousands of lives of cyclists, making cycling much safer.

We also underline another important innovation of our Industry: the bike sharing systems. This concept needs local production in order to provide the best bikes for European cities: a very good example is the bike sharing system in Paris.

Some of our SMEs are also specialists for bikes rentals for hotels and holiday resorts, which greatly help the development of tourism & cycling.

[Bike sharing desasters](#) like the one which happened in China must be avoided, as it is very negative for the image of bicycles and pedal assist ebikes with the [EU Consumers](#), who want better quality, service and a variety of products.

Another new trend for our SMEs is to develop Cargo Bikes which are adopted for the last 5 km deliveries in the EU Cities by many couriers, and also by families with kids for very happy rides on weekends.

6) Also in the downstream there would be a loss of Green jobs, especially at the dealers' level. Totally we have in Europe more than 50.000 bicycle retailers, with an estimated workforce of 150.000 Workers: indeed one of the main reasons that the EU Users (ECF represents millions of cyclists) are against subsidized dumping on Bicycles & Pedal Assist Ebikes is precisely the menace of poor quality and the loss of service at the dealers' level (confirmed in the [attached](#) Japan Industry presentation). With the huge Chinese overcapacity, the hypermarkets and hard discounts' sales (without service) will increase with very low quality bicycles (which are bought as cheap gadgets but don't encourage cycling at all, as confirmed by the [attached](#) ECF letters.

We conclude our study by confirming to your kind attention our deep alarm that over 155.000 EU skilled Workers of one of the most important Green Industries' are at risk to lose their Green jobs without the current antidumping and antisubsidies measures.

The entire EU Industrial system will be weakened, as the EU Bicycle Industry adopts the most innovative and ecological production systems, raw materials and fine mechanics as well as high tech automations.

We underline the ecological sustainability of the EU Bicycle Industry. This industry adopts the latest technologies of non-pollution production (for instance water-based paint, while the PRC's exports are adopting very dangerous paint contents like LEAD or Calmium, which can be very harmful in particular for kids bikes) in full respect of the highest level of EU regulations such as REACH.

The EU Bicycle Industry delivers very innovative, high quality bicycles with very low Co2 emissions, compared to Chinese exported bicycles or pedal assist ebikes, which cost from 61 to 123 kgs of emissions more than manufactured in the EU, as confirmed by the study of the [Milan Politechnico](#).

This means that if all 20 million bicycles & pedal assist ebikes sold in the EU per year would be imported from China, this will cause extra emissions of over 2 million tons of Co2 and other dangerous emissions. PRC - already the largest polluter in the World - at the COP 26 has been pretending to be treated as a developing Country, in order to still adopt until 2060 coal based energy and coal based steel and aluminum production. The result will be that the largest pollution emission in history will even further: the giant dimension of the coal based Co2 emissions can easily be checked in [this](#) pollution radar map.

In the 2016 study, we confirmed that the EU Bicycles, Pedal Assist Ebikes and Components Industry would have invested heavily in the following 5 years to modernize and enhance the technical and environmentally-friendly equipment, to develop new and greener products and to reshore and adopt sustainable production of frames, forks, handle bars, stems which are currently produced with high emissions and subsidized in China. Indeed, our Industry has been investing since then over one Billion Euro per year, also creating "Bike Valley" projects in different EU Industrial Districts such as Romania, Belgium/Flanders, Portugal (see [here](#)).

In 2021, as confirmed by this investments/innovations study the EU Bicycles, Pedal Assist Ebikes and Components Industry has been investing approximately 1.8 Billion euro: a really great achievement!

We are always available for your kind enquiries on these very important issues concerning our very innovative Industry, our Sustainable Manufacturing SMEs and very capable Workers.

Very best regards

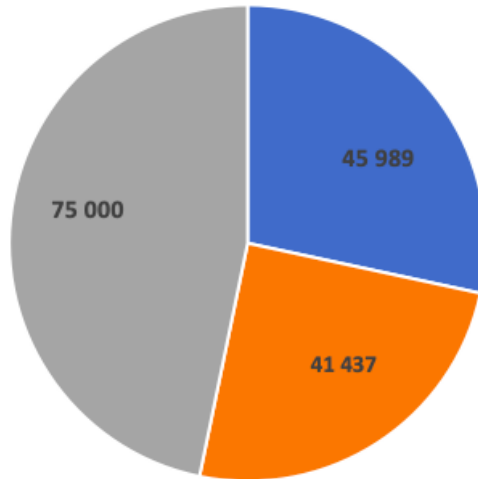
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Employment (direct) and investments in EU Bicycle, EPACs and Parts Industry

Country	Bicycle and EPAC producers			Parts Producers			Total Direct Green Jobs per country	Total Direct and Indirect Green Jobs per country	Total Investments/ Innovations in 2021 (Mill EUR) per country
	No. Of companies	Employees	Investments/ Innovations in 2021 (mill EUR)	No. Of companies	Employees	Investments/ Innovations in 2021 (mill EUR)			
Austria	5	628	8.31	3	31	0,66	659	1 000	8.97
Belgium	21	712	16.48	13	338	9,83	1 050	2 100	26.31
Bulgaria	10	2 210	19.33	1	261	1	2 471	4 000	20.33
Croatia	2	112	1.2	-	-	-	112	200	1.2
Cyprus	-	-	-	-	-	-	-	-	-
Czech Republic	20	1 309	20.74	43	2 767	42,425	4 076	8 000	63.165
Denmark	17	357	8.511	3	47	1,44	404	800	9.951
Estonia	1	10	0.15				10	20	0.15
Finland	5	94	3.5	2	112	2	206	400	5.5
France	37	2 518	69.099	37	2 193	50,732	4 711	9 100	119.831
Germany	100	7 992	341.89	95	18 337	493,05	26 329	45 000	831.94
Greece	3	237	6.3	3	815	9,7	1 052	2 000	16
Hungary	7	1 763	38.03	15	1 021	18,33	2 784	5 400	56,36
Ireland	5	14	0.21	-	-	-	14	30	0.21
Italy	130	11 600	132.525	106	3 901	68,233	15 501	26 000	200.758
Latvia	3	50	0.72	-	-	-	50	100	0.72
Lithuania	1	566	1	-	-	-	566	1 100	1
Luxembourg	-	-	-	-	-	-	-	-	-
Malta	-	-	-	-	-	-	-	-	-
Netherlands	45	3 951	81.41	37	1 565	41,53	5 516	11 000	122.94
Poland	73	6 188	89.183	14	898	13,48	7 086	13 000	102.663
Portugal	28	1 950	25.69	66	6 050	49,53	8 000	14 200	75.22
Romania	4	1 158	16	10	1 939	19,8	2 805	5 500	35.8
Slovakia	13	562	7.31	11	179	2,2	741	1 400	9.51
Slovenia	2	30	0.33	1	84	2,5	94	180	2.83
Spain	20	1 129	26.885	12	552	6,36	1 681	3 200	31.245
Sweden	6	197	2.07	1	10	0,7	207	180	2.77
United-Kingdom	10	652	8	12	337	5	989	1 400	13
Total	568	45 989	924,873	485	41 437	838.500	87 426	155 000	1.764.000

Employment European Bicycle Industry



- Direct Employment Bicycles and EPACs producers
- Direct Employment parts producers
- Estimated Indirect Employment